



Strategic  
Marketing &  
Research, Inc.

# **INDIANA OFFICE OF TOURISM DEVELOPMENT**

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## **Advertising Effectiveness**

**NOVEMBER 2006**

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## BACKGROUND & OBJECTIVES

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For several years, the Indiana Office of Tourism Development has evaluated the effectiveness of its advertising and made changes based on the results. Be it the markets selected or the dollars allocated, the end goal is to boost the economic impact of the state's tourism trade through advertising and realize a high return on investment.

In 2006, IOTD not only changed markets and the manner in which the budget was expended, it changed its branding strategy for the state. With a move from *Enjoy Indiana* to *Restart Your Engines*, the state's goal was to not only improve the state's image but to increase visitation as well.

This study was designed to assess the effectiveness of the advertising through the various stages a potential traveler goes through: being exposed to the advertising, receiving the images and messages relayed by the advertising, finding an interest in the destination and, finally, deciding to visit a particular destination.

The specific goals of this research included the following:

- **Determine the level of advertising recall** generated by Indiana's advertising campaign among target audiences;
- **Compare Indiana's image** to that of its key competitors;
- **Compare consumers' reactions** to Indiana's ads and those of competitors;
- **Evaluate the branding effort, *Restart Your Engines*;**
- **Gauge the effectiveness of advertising** within target markets and compare the relative value of the options under consideration;
- **Evaluate the campaign's influence** on consumers' attitudes and the generation of additional travel to the state;
- **Compare results among targeted geographic regions** which were the focus of the campaign;
- **Determine visitors' activities and expenditures** during their stays in Indiana;
- **Calculate the economic benefit** of the marketing campaign; and
- **Provide specific conclusions and recommendations** relative to the effectiveness of marketing Indiana as a tourism destination.

## METHODOLOGY

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The methodology used in this research was designed to determine if advertising awareness is linked to increased visitation. This methodology, developed by Strategic Marketing & Research Inc., has been used for numerous U.S. destinations.

An on-line survey measured consumers' attitudes and behavior among a representative sample of those to whom the advertising was targeted. This approach facilitates an assessment of the total influence on the target audience and focuses on the level of additional visitation which can be attributed to the advertising.

An on-line survey conducted in October 2006 garnered 1,034 completed surveys from a qualified list which was purchased from Survey Sample International. To qualify for participation, each respondent had to take at least one, overnight, leisure trip per year. Within the sample, quotas were set by geographic region with the following completes:

Cincinnati	179
Champaign	148
Chicago	194
Grand Rapids	155
Indiana Markets	177
Indianapolis	181

The questionnaire, included in the Appendix to this report, included a review of Indiana and key competitors' print, radio and TV ads, evaluation of Indiana ads, travel to Indiana and other states and the specifics of respondents' trips. Upon completion of the data collection process, the data were cleaned and coded for analysis. In the analysis process, the data were weighted to represent the surveyed markets.

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## CAMPAIGN OVERVIEW

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To establish a context for the research findings, it is necessary to review the elements tested, including the Indiana and competitor ads. The Indiana Office of Tourism Development launched a new brand in 2006, *Restart Your Engines*, as a step to improve the state's image and create memorable advertising.

In changing brands, some of the images and footage used in previous Indiana campaigns were revamped with new creative, including design in print and television and audio in radio and TV.

While Indiana ads were tested in all the markets, the competitors were only shown in the markets in which they ran. For that reason, below is a breakdown of the markets and the competitor states whose ads they viewed. It is also notable that Michigan introduced the brand *Pure Michigan* in 2006, but only in three markets, one of which was Cincinnati.

### Competitor Ads Viewed by Market

<b>Cincinnati</b>	MI (Pure Michigan)	KY
<b>Champaign</b>	IL	KY
<b>Chicago</b>	IL	MI (Great Lakes)
<b>Grand Rapids</b>	IL	OH
<b>Indiana Markets</b>	KY	OH
<b>Indianapolis</b>	MI (Great Lakes)	OH

The 2006 marketing budget was virtually unchanged from the previous year. There was a slight shift in how the resources were allocated with increases in print and radio but a decrease in television. However, the print dollars were spent very differently. While in previous years IOTD's print campaign centered on co-op advertising, this year the state continued the co-op advertising and added stand alone, image ads.

Media Type	Investment
Television	\$259,356
Radio	\$144,016
Print	\$276,570
<b>Total Campaign Costs</b>	<b>\$679,941</b>

IOTD added the Grand Rapids market in 2006, investing 15% of its marketing budget there. Over half of the budget was invested in Indiana markets, including Indianapolis.

Market	TV	Radio	Total	%
Champaign	\$18,199	\$5,897	\$24,096	6%
Chicago	\$37,995		\$37,995	9%
Cincinnati	\$45,849	\$33,610	\$79,459	20%
Grand Rapids	\$40,558	\$19,359	\$59,917	15%
Indianapolis	\$56,436	\$36,444	\$92,880	23%
Indiana Markets	\$60,320	\$48,706	\$109,026	27%

## COMPETITIVE SITUATION

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Not only does Indiana have to produce an effective marketing campaign, it has to work in a competitive environment. While advertising can influence consumers' attitudes, most consumers have preconceived notions of Indiana and its competitors. Before reviewing the impact of the advertising, we consider the competition and Indiana's current imagery.

Respondents to the Ad Effectiveness Study were asked to rate various attributes of Indiana and its key competitors. The states were rated via a 5-point scale, where a higher rating is better. Here, a 3.5 is good; 3 or lower indicates a not particularly strong or weak image for a particular attribute.

**In this context, Indiana is considered a welcoming and peaceful place.** The state received the lowest ratings for being an exciting and adventurous place. These results are nearly the same as those recorded in 2005, though the re-branding effort to *Restart Your Engines* attempts to improve Indiana's image to that of a lively and action-packed place. Given that states are some of the best branded products, it is difficult to change consumers' perceptions, and it will take time to see progress in this measure overall. A later review of the impact of the advertising on image shows the differences in brand and perceptions.

We consider the imagery of other states to identify the strengths and weaknesses of Indiana within the competitive set. The table on the following page provides an index of the attributes, by state, compared to the overall. An index of 105 indicates a rating which is 5% higher than average; an index of 97 indicates a rating that is 3% lower than average.

Indiana Attributes	
Attribute	Mean
Is peaceful	3.6
Is welcoming	3.5
Is relaxing	3.5
Is beautiful	3.5
Is simplistic	3.5
Is full of places to discover	3.4
Is charming	3.3
Has arts and culture	3.3
Is fun	3.3
Is refreshing	3.2
Is entertaining	3.2
Is engaging	3.1
Is modern	3.1
Is unique	3.1
Is rejuvenating	3.1
Is adventurous	3.0
Is lively	3.0
Is exciting	3.0
Is action-packed	2.9

As stated, because states are some of the best-branded products, it is difficult to change their image among consumers. As such, Indiana and its competition are viewed similarly to previous evaluations. Illinois is considered lively and entertaining; Kentucky peaceful and beautiful; Michigan is perceived as charming and adventurous, while Ohio has a weak image.

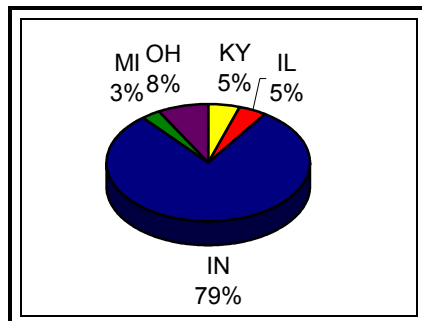
### Competitive Attributes

Attributes	IN	IL	KY	MI	OH
Simplistic	103	92	107	101	97
Peaceful	102	93	107	105	93
Relaxing	100	96	104	105	95
Welcoming	99	99	104	103	94
Charming	96	99	105	106	94
Refreshing	95	99	104	107	94
Beautiful	95	96	108	107	94
Fun	94	107	100	104	96
Has arts & culture	94	116	93	100	97
Full of places to discover	94	104	102	106	94
Engaging	93	107	102	103	95
Rejuvenating	93	101	104	107	94
Modern	93	115	95	101	96
Entertaining	93	111	98	103	96
Unique	92	107	104	104	93
Exciting	91	111	101	102	95
Lively	91	114	98	102	96
Adventurous	90	106	102	106	96
Action-packed	89	112	97	102	99

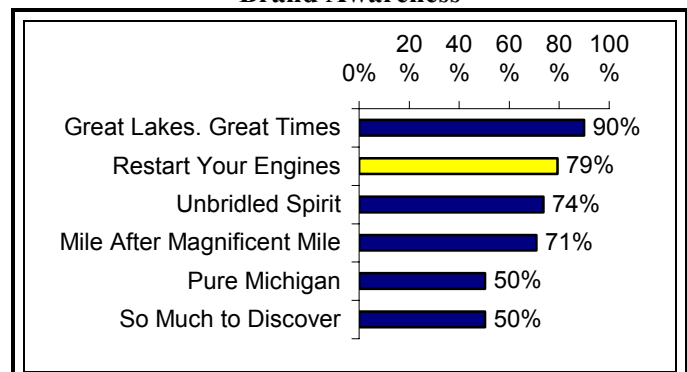
While the competitive situation is challenging, IOTD is on a course to improve the state's image for being fun and lively with the implementation of the *Restart Your Engines* brand. As these attributes are important motivators to travel, IOTD should continue to educate consumers about its product's offerings.

As 2006 was the launch of the *Restart Your Engines* campaign, it is necessary to measure a baseline of correlation between the slogan and Indiana. One of the most positive findings is that **79% of respondents correctly associated Restart Your Engines with Indiana**. This was the second-highest correct correlation among Midwest competitors. Only Michigan's Great Lakes, Great Times had higher awareness, and this slogan has been in use for many years. **This performance is higher than the 60% association that was measured in initial testing, and higher than any other Midwest states' first year performance.**

**Restart Your Engines  
State Association**



**Brand Awareness**



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## AWARENESS

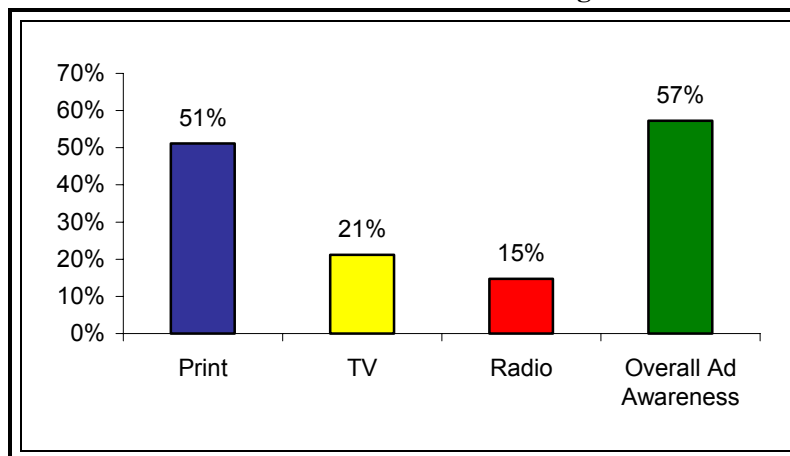
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Advertising Effectiveness research considers the impact of advertising based on the decision-making processes of consumers. The power of an ad is built on consumer exposure. Consequently, the first step in the promotional process is reaching potential visitors. Here, the first measure of effectiveness is “reach,” or the number of households that recalled seeing some portion of a marketing campaign.

Traditional measures of advertising recall involved describing advertising to consumers and asking them if they recalled being exposed to it. This imprecise measure was based on a good description of an ad – or an ad that was easy to describe. SMARI developed a methodology which allows people to actually view the campaign advertising. An on-line survey was launched so that people could see the actual ads. They were then asked to indicate their recall. For this study, three types of media were measured: radio, print, and TV. This approach provides a more accurate measure of how many people were exposed to the advertising and how exposure influenced their travel behavior.

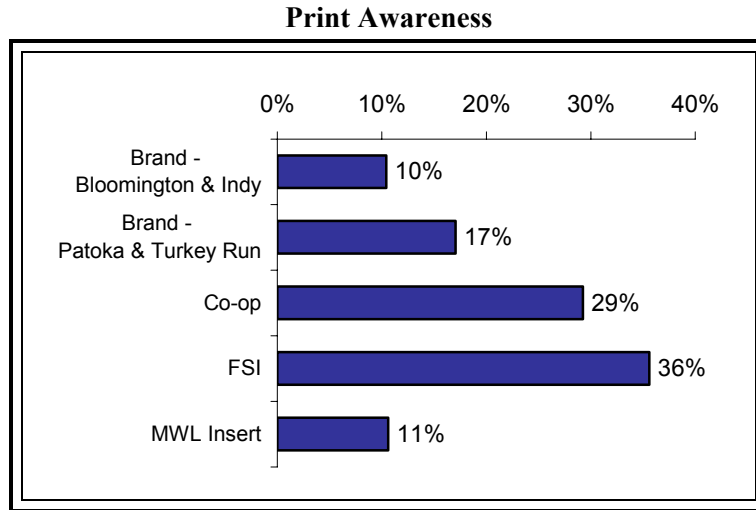
**Overall, Indiana’s ad awareness rating increased slightly – from 55%, in 2005, to 57%, in 2006.** However, significant differences in awareness are noted between the three media. Print awareness increased dramatically – from 30% to 51%. A slight decrease is noted for TV awareness – from 27% to 21% -- but a significant decrease in radio awareness is noted – from 26% to 15%.

**Recall of Indiana Advertising**





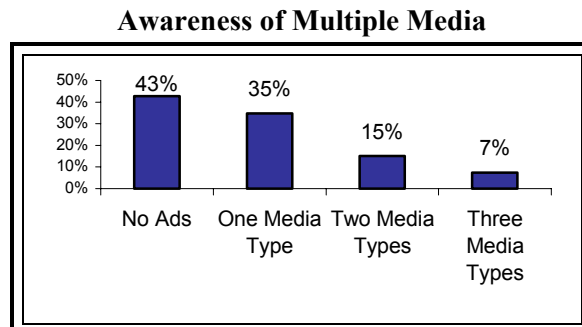
Perhaps the dramatic increase in print awareness can be attributed to multiple factors. As noted earlier, the IOTD expanded its print offerings by producing brand ads and a *Midwest Living* insert, neither having been used in the past. Additionally, to be more representative of Indiana's ad awareness, the Free Standing Insert, or FSI, was included in the 2006 study. And when comparing awareness of the various media, the FSI garnered the highest awareness of all print sources. **The combination of the image ads, the FSI and the cooperative advertising was very successful.**



While the TV awareness rating fell slightly, there were two changes that could have contributed to this. First, though the images and music were the same as the spots that ran in 2004 and 2005, there was a change in brand and voiceover. This slight change could have decreased awareness since *Enjoy Indiana* ran for multiple years. In addition, IOTD should evaluate any changes in the media schedule from 2005 to 2006 as placement of the media buy can often impact awareness.

Unlike TV, the radio creative was entirely new. One significant change from the 2005 spots was the length of the ad. Though IOTD spent more on radio in 2006, the spots were 30 seconds compared to 15 seconds previously. Both years combined spots to make a single one-minute spot. But given that :15 ads make it possible for a tagline to be heard four times and there are only two opportunities with a :30, this could result in decreased awareness. This does not necessarily mean that :15 spots are better or more effective. The creative process should dictate the time necessary to communicate the message and tone of the spot.

Media campaigns are typically most effective when there is overlap among the various media. Of the 57% of the target audience that was aware of the Indiana ads, 22% were aware of more than one type of ad, and just 7% had seen more than two.



Not only is it important to compare the success of various media, it is essential to review awareness against the competitive set. **At 57% awareness, Indiana generated the highest awareness of the competitive states.** Note, however, that these are Indiana's markets and likely include areas in which no competitive ads were run.

#### Overall Awareness

Indiana	57%
Kentucky	47%
Illinois	32%
Michigan -- Great Lakes	30%
Pure Michigan	4%
Ohio	17%

Given the above, we compare Indiana's awareness to that of its competitors by examining each state against the markets in which they actually ran advertising. For example, the *Pure Michigan* campaign ran only in the Cincinnati market, so a true comparison against all of Indiana's markets is not feasible. As such, the table to the right calculates awareness for the competitors by including only the markets in which they invested. In this evaluation, Kentucky performs exceedingly well, though Indiana's awareness rating remains high.

#### Overall Awareness Select Markets

Indiana	57%
Kentucky	72%
Illinois	57%
Michigan -- Great Lakes	54%
Pure Michigan	41%
Ohio	46%

#### Print Awareness

States	All Markets	Select Markets
Indiana	51%	51%
Kentucky	42%	66%
Illinois	26%	26%
Michigan -- Great Lakes	17%	29%
Pure Michigan	2%	19%
Ohio	9%	23%

Though Indiana's print campaign generated very good awareness, the success of Kentucky's print campaign is likely the driver of the high overall awareness. While SMARI is unaware of Kentucky's media plan or any spending increases, this is a dramatic increase for the state as its previous print campaign generated just 18% awareness. **Again, outside of Kentucky, Indiana's print campaign had the highest awareness among competitor states, even though other states have much higher budgets.**

While Indiana's overall and print awareness rating were high compared to the other states, TV generated the lowest awareness of any other competitor when the markets in which their spots ran are considered. This could reflect the dollars that competitors spent in their markets or memorability of the creative. Again the other states all have higher budgets which make competition more difficult.

#### TV Awareness

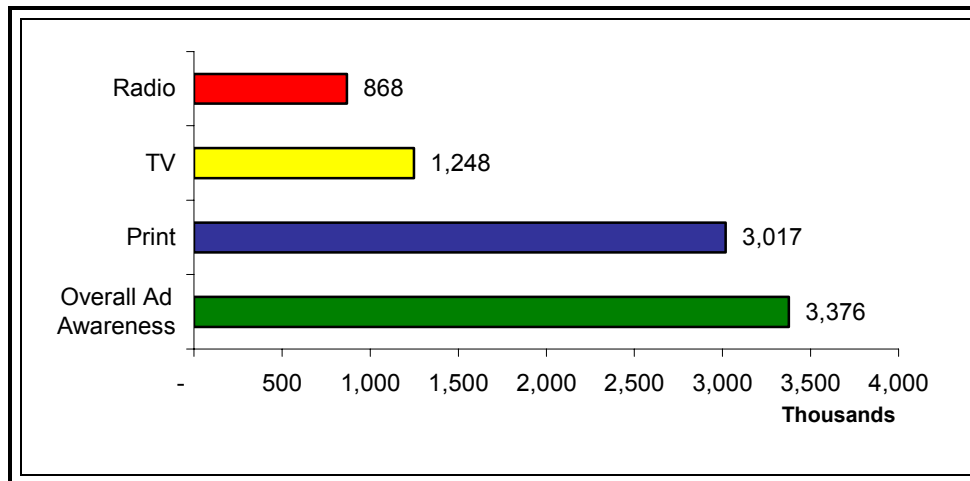
States	All Markets	Select Markets
Indiana	21%	21%
Kentucky	8%	31%
Illinois	20%	38%
Michigan -- Great Lakes	20%	38%
Pure Michigan	3%	32%
Ohio	9%	35%

Radio generated the lowest awareness among the three media for Indiana, and the only other state to employ radio, Ohio, also generated low awareness – even when evaluating just the markets in which it ran. When allocating resources, the use of radio should be considered. Given that travel planning is visually driven, it is difficult to effectively communicate to a target audience with this medium.

Radio Awareness		
Market	All Markets	Select Markets
Indiana	15%	15%
Ohio	4%	14%

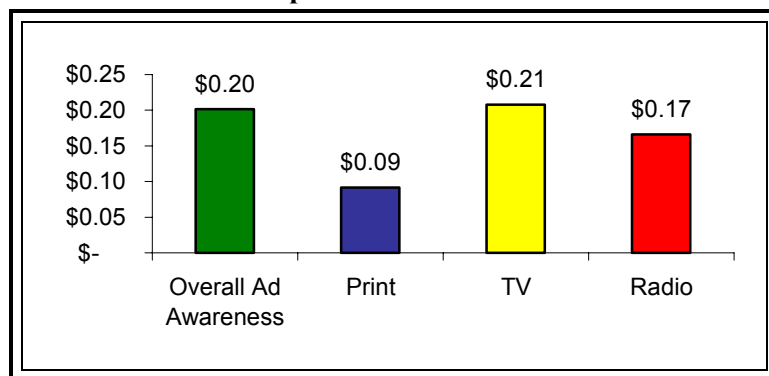
Campaign reach can also be considered by calculating the number of households that claimed exposure to each medium. Given that print generated such high awareness as compared to TV and radio, it reached far more households. In 2006, the total number of aware households was approximately 3.4 million.

**Number of Aware Households**



**Cost per Aware Household**

Once the number of aware households is determined, the media costs can be considered to discern the cost of generating an aware household. **The overall cost to reach a household increased slightly -- from \$0.16, in 2005, to \$0.20, in 2006.**



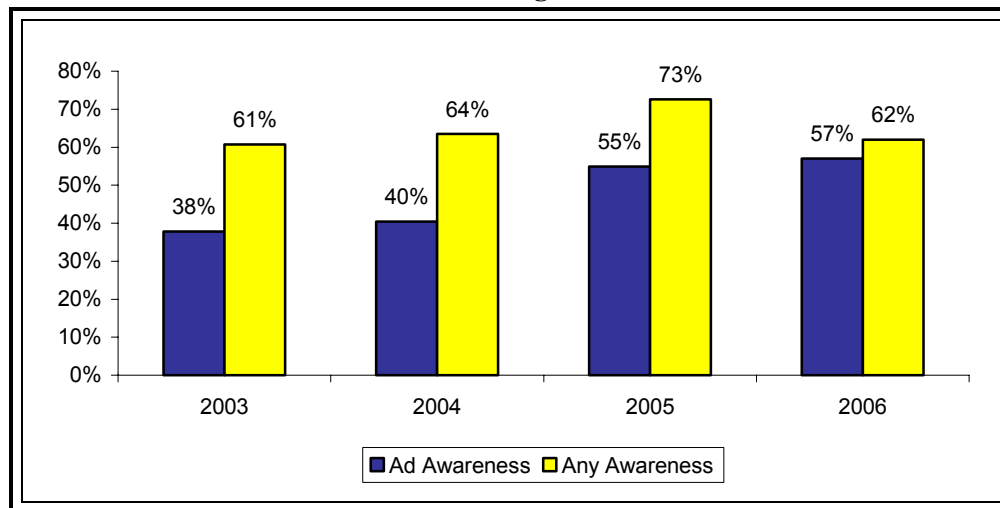
Aside from viewing the advertising, the respondents were asked if they had seen any other types of communication since January. While Indiana recorded the highest recall rating for an article or story, as with advertising recall, this was likely as the markets being evaluated are *Indiana's* target markets and are not necessarily targets for competitors. **Of concern, however, is that in 2005, 33% of those surveyed recalled receiving an e-mail from Indiana, while only 12% did in 2006.**

#### Recall of Ancillary Media

	Indiana	Kentucky	Illinois	Michigan	Ohio
Article or Story	33%	20%	19%	20%	31%
Received E-mail	12%	6%	5%	5%	10%

The drop in e-mail recall likely contributed to a decrease in awareness of any marketing effort. While the advertising recall rating rose over 2005, awareness of any marketing effort fell – from 73%, in 2005, to 62%, in 2006. It is not likely, however, that e-mail awareness was the only factor contributing to drop. The 2006 awareness of any marketing effort is slightly lower than even 2004 when only 7% were aware of an e-mail campaign. That year, though, there was also direct mail, which had nearly 12% awareness.

#### Awareness Tracking – 2003 to 2006



However, the awareness of paid advertising continues to increase. Though there was a slight change from 2005, in just three years IOTD has increased awareness of its paid media by nearly 20%.

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## ADVERTISING MESSAGE

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While advertising must first generate awareness, it must also motivate people to visit the state. Since people are exposed to myriad travel messages, it is important that Indiana's advertising be meaningful and motivating.

On a 5-point scale, where the higher the number the stronger the respondent's agreement that the advertising fulfilled its intent, the campaign was evaluated by three motivating criteria. Generally, with this scale, the goal is a rating of "4" or higher. SMARI has used this scale to rate travel advertising for a wide variety of states and destinations and, relative to travel advertising, a "4" or higher is sometimes though not consistently achieved. We find that a "3.5" is considered good and scores above "3" are acceptable for motivation. Given that the criteria evaluated imply action taken by the consumer - something difficult to accomplish - it is much more difficult to garner high ratings.

Indiana has tracked the motivation ratings since 2003, and has seen consistent improvement. Though the ratings did not change from 2005 to 2006, **the motivation ratings are in fact quite encouraging, as they all rate above the threshold of 3.0.**

### Motivation Ratings – 2003 to 2006

	2003	2004	2005	2006	Diff
Makes you more interested in traveling within the state	3.2	3.5	3.6	3.6	0.4
Left you wondering about location & wanting more info	3.1	3.5	3.5	3.5	0.4
Makes you interested in visiting the state's website	3.1	3.4	3.4	3.4	0.3

Another benefit of advertising effectiveness research is that it provides some evaluation of the ads themselves. After viewing all the ads for Indiana and competitors and reporting whether they recalled seeing them, the respondents were asked to rate the campaign on several key attributes. On a 1 through 5 rating scale such as this, a rating of 3.5 or higher is *desired*, while a rating of 3.0 or more is considered *acceptable*.

While the motivation ratings have not changed since 2005, all the communication ratings increased 0.1 from the previous year. While these are certainly important, it is concerning that the motivation ratings did not increase along with the communications ratings. **Because so much of travel planning is now done via the Internet, IOTD should focus on making the advertising a more compelling driver to the Web.**

**While other states' ads may have received better ratings, overall, Indiana's advertising remains competitive.** Though the Kentucky and Illinois ads perform well across all measures, the most interesting competitor is Michigan. Though the state has employed *Great Lakes, Great Times* for several years, thought to be a successful campaign, Michigan tested a new brand, *Pure Michigan*, in a handful of markets. The new creative performed significantly better than the well established *Great Lakes, Great Times*.

#### Communication & Motivation Ratings

	IN	KY	IL	MI Great	Pure MI	Ohio
Makes you more interested in traveling within the state	3.6	3.8	3.8	3.4	3.7	3.2
Left you wondering about location & wanting more info	3.5	3.6	3.7	3.3	3.5	3.2
Makes you interested in visiting the state's website	3.4	3.6	3.6	3.3	3.5	3.2
Makes the state seem fun & exciting	3.6	3.8	3.9	3.4	3.6	3.4
Makes it appear scenic & beautiful	3.8	4.0	4.0	3.6	4.0	3.3
Shows something unique & remarkable about the state	3.7	3.9	3.9	3.2	3.7	3.2
Portrays it as a place full of unexpected discoveries	3.7	3.8	3.8	3.4	3.6	3.3

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## BRAND MESSAGE

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In 2006, IOTD launched a re-branding effort because past assessments of *Enjoy Indiana* revealed that the brand communicated that the state was welcoming but simplistic and charming, IOTD attempted to change this image by launching *Restart Your Engines*.

The survey participants were asked to choose among Indiana's tagline and those of its competitors which state best communicated particular messages. Because each message could only be associated with one state, a score of 40% indicates that this percentage of respondents chose the Indiana tagline as best communicating the particular message, and the remaining 60% were split between four competitors.

**When comparing to the ratings earned by Enjoy Indiana, in 2005, Restart Your Engines turned the message from welcoming and relaxing to more action-packed and exciting. But the Restart Your Engines tagline also communicates a sense of fun and rejuvenation, that can build on existing images of the state while broadening its appeal.** The table below sorts the communication messages by differences between the taglines.

	Enjoy Indiana	Restart Your Engines	Difference
Action-packed	8%	40%	33%
Exciting	7%	27%	20%
Lively	9%	25%	16%
Engaging	10%	20%	9%
Modern	13%	20%	7%
Unique	9%	16%	7%
Entertaining	11%	17%	6%
Adventurous	7%	13%	6%
Rejuvenating	21%	25%	4%
Fun	16%	19%	3%
Full of places to discover	8%	9%	2%
Arts and culture	13%	8%	-5%
Beautiful	13%	6%	-7%
Refreshing	24%	16%	-8%
Charming	37%	13%	-24%
Peaceful	44%	14%	-30%
Simplistic	52%	21%	-31%
Relaxing	47%	16%	-31%
Welcoming	47%	15%	-32%

## IMPACT OF THE ADVERTISING -- IMAGE

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As seen, IOTD's new brand, *Restart Your Engines* conjures very different messages from the old tagline, *Enjoy Indiana*. The result, however, is not an immediate shift in imagery. The top rated attributes for the state remain welcoming and relaxing.

Before being exposed to the advertising, the survey respondents were asked to rate the state on numerous attributes. This approach allows us to evaluate the image of the state on behalf of those who were aware of the Indiana advertising against those who were unaware. **Those who were aware of the advertising were more positive about the state with the greatest differences relative to peaceful, beautiful and charming. This relates to the dual message from the brand – action and rejuvenation.** Several ads highlighted the scenic beauty and relaxation available in the state.

### Advertising Impact on Perception – Aware vs. Unaware

Indiana is...	Ad Unaware	Ad Aware	Diff.
Peaceful	3.4	3.7	0.2
Beautiful	3.5	3.7	0.2
Relaxing	3.4	3.7	0.2
Charming	3.3	3.6	0.2
Welcoming	3.5	3.7	0.2
Has arts & culture	3.4	3.6	0.2
Refreshing	3.3	3.4	0.1
Full of places to discover	3.5	3.7	0.1
Fun	3.4	3.5	0.1
Entertaining	3.3	3.4	0.1
Unique	3.2	3.4	0.1
Simplistic	3.4	3.5	0.1
Rejuvenating	3.2	3.3	0.1
Exciting	3.2	3.3	0.1
Engaging	3.2	3.3	0.1
Lively	3.2	3.3	0.1
Adventurous	3.2	3.3	0.1
Modern	3.2	3.3	0.1
Action-packed	3.1	3.1	0.0



Though the traditional perceptions of Indiana remain, **it appears that the re-branding effort is moving the audience to more positive perceptions of the state.** In evaluating attributes, the new brand attempts to improve, we are able to compare those who were aware of 2005 advertising verses those who were aware of 2006 advertising; it appears the brand is having a positive impact.

**Advertising Impact on Perception – 2005 vs. 2006**

<b>Indiana is...</b>	<b>2005 Ad Aware</b>	<b>2006 Ad Aware</b>
Exciting	3.2	3.3
Lively	3.2	3.3
Adventurous	3.1	3.3
Modern	3.3	3.3
Action-packed	3.0	3.1

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## IMPACT OF THE ADVERTISING -- TRAVEL

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Indiana's objective is to attract visitors, and the ultimate measure of advertising success is whether it is boosting the state's tourism trade. The impact, in terms of trip visitation, is measured in two ways. The Advertising Effectiveness Study compares the level of travel among those who did not see the advertising to those who did. Any additional travel among those who saw the campaign is considered *incremental* travel and is attributed to the campaign.

First, it is useful to assess the impact of the campaign on consumers. Again, impact is measured by whether the level of travel to Indiana was higher among those who were exposed to the advertising. **People who saw and/or heard the Indiana ad campaign reported more travel to the state, with a positive difference of 18%. When PR and direct marketing efforts are included, incremental travel increases to 24%.**

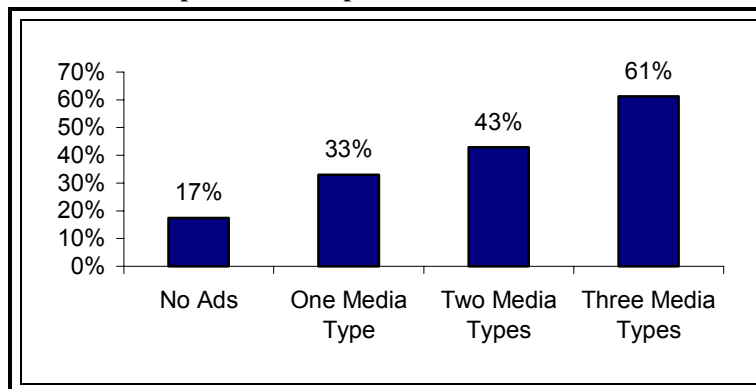
**This incremental travel rate is the highest among Indiana's competitors.** Again, remember that the markets surveyed are *Indiana's* markets and the audience likely did not have opportunity to be exposed to all the competitor states' advertising. This is not necessarily due to a lack of awareness but because the competitors advertise in different target markets.

Impact of States' Marketing

	No Ads	Any Marketing	Impact
Michigan	9%	20%	10%
Kentucky	26%	28%	2%
<b>Indiana</b>	<b>13%</b>	<b>38%</b>	<b>24%</b>
Ohio	17%	30%	13%
Illinois	14%	19%	5%

As discussed, awareness of multiple elements of an ad campaign often leads to increased travel. This is true for Indiana's initial *Restart Your Engines* campaign. **The more ads consumers are exposed to, the more likely they are to travel.** In the awareness discussion, however, it was noted that very little media overlap occurred with this campaign. Given the significant impact that exposure to multiple media can have on travel, future media buys should consider ways in which to increase media overlap.

Impact of Multiple Mediums on Travel



## TRIP SPECIFICS

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While Indiana's marketing campaign focused on promoting travel during the summer and fall seasons, it is important to know when travelers actually visited and what activities they enjoyed while in the state. The specifics of visitors' trips can also be a measure of ad effectiveness. By comparing travelers who were aware of the Indiana advertising to travelers who were unaware, differences are often noted in visitors' activities, the duration of their stay and, most importantly, their spending.

Given the sheer quantity of Indiana ads tested – nine TV, eight radio and eight print – there was a great variety in the products featured. Some were geared toward families with children, through amusement parks, while others, featuring cultural arts themes, were aimed at older couples. With the exception of just three activities, those who were aware of the ads were more likely to participate in an activity than those who were unaware.

### Trip Activities by Awareness

Activities	No Ads	Ad Aware	Diff*
Go to lakes, rivers, or other natural features	32%	49%	17%
Visit zoos or children-oriented museums	8%	24%	16%
Go hiking or biking	7%	22%	15%
Visit with friends or relatives	27%	40%	13%
Visit state or national parks	11%	24%	13%
Enjoy scenic beauty	55%	67%	12%
Eat at restaurants unique to the area	47%	58%	12%
Outdoor activities	13%	24%	11%
Go shopping	52%	61%	9%
Visit small or quaint towns	29%	37%	8%
Go antique shopping	13%	20%	8%
Go to a music concert	6%	12%	7%
Visit historic sites	22%	29%	6%
Look for distinctive architecture	12%	16%	4%
Attend fairs or festivals	21%	25%	3%
Take scenic drives or driving tours	33%	36%	3%
Attend musical performances	2%	5%	3%
Visit amusement or theme parks	15%	17%	2%
Visit nightclubs or bars	14%	15%	2%
Go camping	19%	21%	1%
Visit larger more metropolitan cities	16%	16%	1%
Gamble at a riverboat casino	20%	16%	-4%
Visit art or cultural museums	16%	11%	-4%
Attend sporting events	15%	11%	-5%

\* Numbers may not add due to rounding

An increase in the number of activities in which ad aware visitors participated is likely a driver of increased spending. Visitors who were aware of Indiana advertising spent 13% more than those who were unaware. However, because aware visitors included more people in their travel parties, the per-person per-day spending was lower.

As in 2005, one of the most notable differences between ad aware and non-ad-aware visitors was the percentage that traveled with children. While slightly more ad-aware people included children, in 2005, significant differences are noted this year. This leads to more people in the travel party, which often results in higher spending.

As in previous years, visitation to Indiana was heaviest in the summer. While the IOTD also promotes travel in the fall, its primary campaign highlights summer travel.

### Visitor Spending

	No Ads	Ad Aware
Lodging	\$ 129	\$ 135
Food	\$ 107	\$ 121
Attractions	\$ 53	\$ 61
Recreational expenses	\$ 12	\$ 18
Novelties and souvenirs	\$ 30	\$ 30
Shopping	\$ 83	\$ 104
Entertainment	\$ 27	\$ 29
Transportation	\$ 73	\$ 92
Other	\$ 25	\$ 21
<b>TOTAL</b>	<b>\$ 540</b>	<b>\$ 612</b>
Per-person/Per-day	\$ 193	\$ 180

### Overnight Trip Specifics

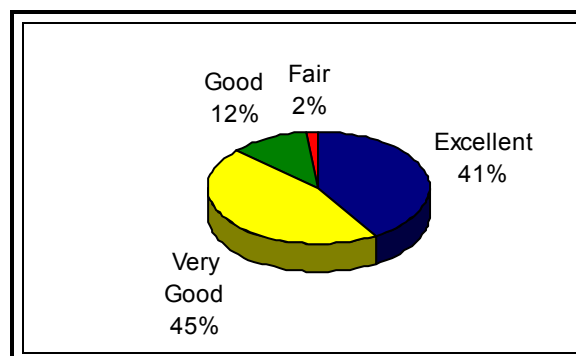
	No Ads	Ad Aware
People on trip	2.8	3.4
Nights spent on vacation	2.2	2.5
% With Children	27%	38%

### Travel Seasons

Spring	22%
Summer	47%
Fall	24%
Winter	7%

Finally, because satisfaction often impacts future travel, it is encouraging that 86% of travelers rated their Indiana experience “excellent” or “very good” – up from 80%, in 2005.

### Visitor Satisfaction



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## DEMOGRAPHICS

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While Indiana has typically attempted to reach a more upscale audience, the 2005 demographic profile of ad-aware respondents versus the non-ad-aware revealed that the non-ad-aware earned higher incomes and were better educated. This is also true in 2006.

This could be a function of IOTD investing heavily in television as TV viewers traditionally earn lower incomes and are less well educated than non-viewers. **However, because incremental travel and therefore economic impact increased significantly in 2006, it is likely that the media targets are effective and should be continued.**

### Demographic Profile

	No Ads	Ad Aware
<b>Marital Status</b>		
Married	61%	65%
Divorced	15%	13%
Widowed	3%	5%
Single/Never Married	22%	17%
<b>Education</b>		
High school or less	19%	20%
Some college/technical school	33%	37%
College graduate	34%	30%
Post graduate degree	14%	14%
<b>Income</b>		
Less than \$12,500	3%	2%
\$12,500 but less than \$20,000	3%	7%
\$20,000 but less than \$30,000	9%	11%
\$30,000 but less than \$50,000	23%	25%
\$50,000 but less than \$70,000	28%	25%
\$70,000 but less than \$100,000	21%	18%
\$100,000 or more	15%	12%
People in household	2.8	2.9
Age	46	46
% With Children	30%	34%

## ECONOMIC IMPACT

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The final measure of Indiana's marketing campaign brings together awareness, rate of travel and trip expenditures to determine the campaign's economic impact, taxes generated for the state (based on 6% sales tax) and return on investment for every \$1 the Indiana Office of Tourism Development spends.

The economic impact measure is based only on *the additional travel which can be linked to the advertising*. This is calculated by subtracting the percentage of visitors to Indiana who were unaware of the advertising from those who were aware. The resulting difference is the *incremental travel*, or the level of travel attributable to Indiana's marketing efforts. For example, the level of incremental travel for any of Indiana's marketing efforts is calculated as follows:

### Incremental travel for any marketing awareness

Level of travel by unaware visitors	13%
Level of travel by aware visitors	38%
<b>Incremental travel</b>	<b>24%</b>

\*Calculation differs due to rounding

For both paid media and any marketing efforts, the *incremental* travel increased significantly in 2006, resulting in far more trips attributable to advertising. Thus, **the economic impact, and return on investment figures rose dramatically from the previous measure.**

Though the percentage of aware households increased slightly – from 55%, in 2005, to 57%, in 2006, a change in markets resulted in fewer aware households. In 2006, IOTD selected the markets of Cincinnati, Champaign, Chicago, Grand Rapids, Indiana and Indianapolis – which have fewer total households than the markets selected in 2005. But **the increment of travel was much higher, and over 600,000 incremental trips were generated. Since these increases were achieved with a similar budget, the ROI and Tax ROI were also much higher.**

	Ad Aware 2004	Ad Aware 2005	Ad Aware 2006
Aware households	2,882,347	3,677,817	3,340,650
X Incremental travel	14%	10%	18%
Incremental trips	397,764	378,815	601,735
Spending per Trip	\$575	\$645	\$612
<b>Economic Impact</b>	<b>\$228.7 million</b>	<b>\$278.9 million</b>	<b>\$368.5 million</b>
Tax Generated	\$13.7 million	\$16.7 million	\$22.1 million
Ad spending	\$810,310	\$677,973	\$679,941
<b>ROI</b>	<b>\$282</b>	<b>\$411</b>	<b>\$542</b>
Tax ROI	\$17	\$25	\$33

While the above only accounts for awareness of paid media (print, radio and TV), IOTD markets the state via other vehicles, including PR and direct marketing. Though awareness of the paid media increased slightly, a decrease is noted in the number of people that were aware of this additional marketing. In 2005, 73% were aware of some form of IOTD marketing. In 2006, this figure is 62%, resulting in far fewer aware households. As such, we see a slight decrease in economic impact and ROI. While IOTD had an active public relations program in place, these efforts are always dependent upon space available and the interest in the targeted publications. It may be that Indiana received less coverage, or that other states had more. **While there was a decrease compared to last year, the ROI and Tax ROI for the overall marketing effort is extremely high and represents strong success.**

	Any Marketing 2004	Any Marketing 2005	Any Marketing 2006
Aware households	4,530,421	4,863,561	3,560,982
X Incremental travel	20%	16%	24%
Incremental trips	910,615	778,170	848,431
Spending per Trip	\$550	\$654	\$599
<b>Economic Impact</b>	<b>\$500.8 million</b>	<b>\$581.0 million</b>	<b>\$507.9 million</b>
Tax Generated	\$30 million	\$34.9 million	\$30.5 million
Ad spending	\$810,310	\$677,973	\$679,941
<b>ROI</b>	<b>\$618</b>	<b>\$857</b>	<b>\$747</b>
Tax ROI	\$37	\$51	\$45

## MARKET PERFORMANCE

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The overall economic impact produced by a campaign is an important measure relative to making decisions about advertising. It is also essential to evaluate the performance of each target market. Grand Rapids was a new market for IOTD, and though it produced the lowest ROI of all the targets, at \$292 for every \$1 invested, it performed better than the markets targeted in 2005, which were dropped – Dayton and Peoria.

Cincinnati recorded a significant increase in ROI – from \$186, in 2005, to \$662, in 2006. This is likely due to a shift in incremental travel – from 8% to 24%. The top performing market was Chicago. Certainly its population is a factor, but it recorded the second highest level of incremental travel behind Cincinnati. And while the economic impact was higher for this market than in 2005, increased spending for this market decreased the ROI by 27% from 2005.

	Advertising Awareness					
	Cincinnati	Champaign	Chicago	Grand Rapids	Indiana Markets	Indy
Aware households	348,331	154,030	1,441,606	259,125	534,813	602,746
X Incremental travel	24%	11%	19%	13%	18%	17%
Incremental trips	84,092	16,469	269,218	32,938	96,070	102,948
Spending per Trip	\$625	\$523	\$688	\$531	\$580	\$475
<b>Economic Impact</b>	<b>\$52.6 M</b>	<b>\$8.6 M</b>	<b>\$185.2 M</b>	<b>\$17.5 M</b>	<b>\$55.7 M</b>	<b>\$48.9 M</b>
Tax Generated	\$3.2 M	\$517,000	\$11.1 M	\$1.1 M	\$3.3 M	\$2.9 M
Ad spending	\$79,459	\$24,096	\$37,995	\$59,917	\$109,026	\$92,880
<b>ROI</b>	<b>\$662</b>	<b>\$358</b>	<b>\$4,873</b>	<b>\$292</b>	<b>\$511</b>	<b>\$526</b>
Tax ROI	\$40	\$21	\$292	\$18	\$31	\$32



## CONCLUSIONS & RECOMMENDATIONS

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The economic impact of the ad campaign rose by nearly 33% over the number recorded in 2005 – from \$278.9 million to \$368.5 million. It is especially positive to note that these increases were achieved with no increase in budget. This resulted in an ROI of \$542 for every \$1 Indiana invested in marketing, which is again substantially higher than in 2005. This is largely due to an increase in incremental travel – the difference in the number of visitors that were aware of the advertising versus those who were unaware.

When ancillary efforts such as public relations and direct marketing are included, a decrease in the overall economic impact of the state's marketing efforts is noted. Awareness dropped by 11%, reflecting the fact that far fewer households were made aware of the advertising. The decline in the number of consumers that were aware of Indiana's e-mail marketing efforts likely contributed to the decrease in awareness of any marketing. While there was a decrease compared to last year, the ROI and Tax ROI for the overall marketing effort is extremely high and represents strong success.

The introduction of the new brand *Restart Your Engines* was quite successful. Overall 79% of the people associated the new brand with Indiana – an exceptionally high number. The state has found a brand that “fits” with the state –but also conveys positive images of the state as a travel destination. The *Restart Your Engines* campaign suggests imagery surrounding the words, action-packed, exciting and lively, but also sends a message of rejuvenation and relaxation. While the campaign has not yet had a major impact on the overall image of the state, it is having a positive impact on attitudes. It will take time –and money- to change current perceptions of the state on a broad basis.

In evaluating the performance, the campaign had a strong reach. Overall, 57% of consumers in Indiana's target markets recalled some form of paid advertising, with print media out-performing TV and radio. Among the various advertising efforts, the Free Standing Insert was the most well known, with 36% of the markets recalling the piece. Compared to 2005, TV and radio awareness dropped slightly. For both media, this could be attributed to the change in brand. While the *Enjoy Indiana* spots had been running for several years, 2006 marked the beginning of the *Restart Your Engines* campaign. In addition, radio was changed from 15-second spots to 30-second spots. Because :15 ads allow a message to be heard twice as many times as a :30, the length of the spot could have contributed to weaker awareness. This does not mean that :15 spots are better. IOTD needs to decide which spots are the most effective in communicating a message and setting a tone. While there were shifts in recall by media, the overall performance was an improvement over last year and indicates that media plan worked well.

Though 57% of the target audience was aware of Indiana advertising, there was very little media overlap. IOTD should attempt to increase its media overlap given that the greater the overlap the more likely consumers are to travel to Indiana.

## Recommendations:

- *The launch of the Restart Your Engines brand went well, and consumers have strong association between the brand and the state. Continue to promote Restart Your Engines. While it will take time for the brand to change entrenched perceptions of Indiana, this brand helps convince those who see the ads that the state is more exciting and action-packed than they thought. At the same time the brand shows people they can relax and rejuvenate in the state. This duality helps position Indiana as a desirable travel destination.*
- *The current media plan is working generally and delivered high levels of recall. It would be useful to review radio and evaluate its effectiveness. IOTD should also consider other options for creating more synergy and overlap between media.*
- *All of the current markets performed well. While the weakest performer was Grand Rapids, it was also a first-time market. It would be valuable to continuing advertising in all markets, with possible increased investment in Chicago.*
- *While the creative is working well and communicates desired messages, it is not as effectively encouraging visitation to the web. Consider how the ads could better drive traffic to [www.visitindiana.com](http://www.visitindiana.com). Additionally, IOTD should continue to refine the creative given the challenging competitive environment.*
- *Because the impact of public relations has dropped, evaluate those efforts and identify ways to address the issue. The main drop was noted in terms of recall of e-marketing efforts, so these should be reviewed, and perhaps strengthened.*

## **APPENDIX**

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## Indiana Tourism - Advertising Effectiveness Survey

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September 2006  
993127

Thank you for participating in our travel survey. Your opinions are valuable to us! This survey is about travel and vacation choices. This is for research purposes only and is an opportunity for you to give feedback to travel destinations so that they can improve. No sales effort will ever result from your participation.

This survey will take approximately 20 minutes to complete. Before you begin, there are a few things to note about the survey:

1. For most questions, simply click on the button of your response and then click on the Next button to go on to the next question.
2. If you need to go back to the preceding question to change your response, click on the Previous button.
3. For some questions, you will need to scroll down to respond to all the questions on a screen.
4. You will be viewing actual print and television ads as part of this survey, and it may take a short time for the ads to load onto your computer for viewing.

To stop at any point, close the browser window. The survey will terminate and you will not be able to re-enter.

[THREE LINKS – INDIANA(in LINK) & INDIANAPOLIS(ip LINK) WILL NOT GET QS1. AND OTHER LINK WHICH WILL GET QS1.]

LINK in gets IN, KY & OH ADS  
LINK ip gets IN, MI (Michigan.org), & OH ADS  
IF S1 = 1, gets IN, MI (Pure Michigan) & KY ADS  
IF S1 = 2, gets IN, IL, KY ADS  
IF S1 = 3, gets IN, IL AND MI (Michigan.org) ADS  
IF S1 = 4, gets IN, IL AND OH ADS

S1. Which of the following markets is closest to where you live?

- 1... Cincinnati
- 2... Champaign
- 3... Chicago
- 4... Grand Rapids

S2. Who in your household is primarily responsible for making decisions concerning travel destinations?

- ☐ Me
- ☐ My spouse (TERMINATE)
- ☐ Jointly with my spouse
- ☐ Someone else (TERMINATE)

S3. Do you normally take at least one overnight, pleasure trip per year?

☐ **Yes**

☐ No **TERMINATE**

1. Please consider the following statements concerning [INSERT STATE]. Indicate how much you agree with each statement by marking a number on the 5 point scale, where the more you agree with the statement, the higher the number. A rating of 5 means that you *strongly agree* with the statement, while a 1 means you *strongly disagree*. You can use any number from 1 to 5.

ASK FOR INDIANA AND ONE OTHER STATE, CHOSEN RANDOMLY

MICHIGAN  
KENTUCKY  
OHIO  
ILLINOIS

How much do you agree that [INSERT STATE]...	Strongly disagree				Strongly agree
Is welcoming	1	2	3	4	5
Is engaging	1	2	3	4	5
Is entertaining	1	2	3	4	5
Is simplicity	1	2	3	4	5
Is full of places to discover	1	2	3	4	5
Is exciting	1	2	3	4	5
Is unique	1	2	3	4	5
Is fun	1	2	3	4	5
Is lively	1	2	3	4	5
Is beautiful	1	2	3	4	5
Has arts and culture	1	2	3	4	5
Is relaxing	1	2	3	4	5
Is action-packed	1	2	3	4	5
Is adventurous	1	2	3	4	5
Is charming	1	2	3	4	5
Is modern	1	2	3	4	5
Is rejuvenating	1	2	3	4	5
Is refreshing	1	2	3	4	5
Is peaceful	1	2	3	4	5

2. Since the first of the year, which of the following states was the destination for a leisure trip that included an overnight stay?

SELECT ALL THAT APPLY

- ☐ MICHIGAN
- ☐ KENTUCKY
- ☐ INDIANA
- ☐ OHIO
- ☐ ILLINOIS
- ☐ NONE OF THE ABOVE

(IF Q2=INDIANA, ASK Q3-10 ABOUT TRIP TO INDIANA. IF RESPONDENT DID NOT SELECT INDIANA, RANDOMLY SELECT ANOTHER STATE SELECTED IN Q2 AND ASK ABOUT THAT **ONE** STATE)

Now, please give us some information about the trip you took this year to [INSERT NAME OF STATE].

3. For the most recent trip you took to [INSERT STATE], in what season did you visit?

- ☐ Winter (December - February)
- ☐ Spring (March - May)
- ☐ Summer (June – August)
- ☐ Fall (September- November)

4. As part of your trip, did you...?

- ☐ Use paid accommodations
- ☐ or Stay with family and/or friends

5. Including yourself, how many people were on this trip? ENTER # \_\_\_\_\_

6. How many were children under the age of 18 yrs old? ENTER # \_\_\_\_\_

7. Which of the following places or activities did you visit or participate in as a part of your trip? (Mark all that apply.)

- ☐ Look for distinctive architecture
- ☐ Visit historic sites
- ☐ Attend musical performances such as the symphony, opera, theater, or ballet
- ☐ Visit art or cultural museums
- ☐ Visit zoos or children-oriented museums
- ☐ Visit amusement or theme parks
- ☐ Enjoy scenic beauty
- ☐ Go to lakes, rivers, or other natural features
- ☐ Go hiking or biking
- ☐ Outdoor activities, such as fishing, hunting, canoeing, boating or sailing
- ☐ Go camping
- ☐ Go to a music concert
- ☐ Visit nightclubs or bars
- ☐ Go shopping
- ☐ Gamble at a riverboat casino

- ☐ Eat at restaurants unique to the area
- ☐ Attend fairs or festivals
- ☐ Go antique shopping
- ☐ Take scenic drives or driving tours
- ☐ Attend sporting events
- ☐ Visit larger more metropolitan cities
- ☐ Visit small or quaint towns
- ☐ Visit state or national parks
- ☐ Visit with friends or relatives
- ☐ None of the above

8. To better understand the economic impact of tourism, we are interested in finding out the approximate amount of money you and other members of your travel party spent on your most recent trip while in [INSERT STATE]. Please estimate how much your travel party spent in total on...?

- a. Lodging \_\_\_\_\_
- b. Meals/Food/Groceries \_\_\_\_\_
- c. Attractions \_\_\_\_\_
- d. Recreational expenses such as boat rental, golf fees, etc. \_\_\_\_\_
- e. Novelties and Souvenirs \_\_\_\_\_
- f. Shopping \_\_\_\_\_
- g. Entertainment such as admission fees to events or shows \_\_\_\_\_
- h. Transportation such as gas/auto expenses/auto rental/flight costs \_\_\_\_\_
- i. Other \_\_\_\_\_

9. How many *nights* did you spend in [INSERT STATE] on that vacation?

**RECORD NUMBER** \_\_\_\_\_

10. Overall how would you rate the experience you had in the state of [INSERT STATE]? Would you say it was...?

- ☐ Excellent
- ☐ Very Good
- ☐ Good
- ☐ Fair
- ☐ Poor

IF S1= 1, SKIP TO 13

11. Most states have advertising slogans they use to promote travel to their state. Please look at the following slogans and match them with the appropriate state.

SHOW EACH SLOGAN, WITH THE LIST OF STATES – ROTATE SLOGANS

- [ ] \_\_\_\_\_ Restart Your Engines
- [ ] \_\_\_\_\_ So Much to Discover
- [ ] \_\_\_\_\_ Great Lakes. Great Times
- [ ] \_\_\_\_\_ Unbridled Spirit
- [ ] \_\_\_\_\_ Mile After Magnificent Mile

- 1.....Kentucky
- 2.....Illinois
- 3.....Indiana
- 4.....Michigan
- 5.....Ohio

12. Please look at the following slogans and select the one that most represents each word. For example, which one is the most *fun*? You can only choose one slogan for each word.

- ☐ Indiana. Restart Your Engines  
☐ Ohio. So Much to Discover  
☐ Illinois. Mile After Magnificent Mile  
☐ Michigan. Great Lakes. Great Times.  
☐ Kentucky. Unbridled Spirit

- ☐ Welcoming .....  
☐ Engaging .....  
☐ Entertaining .....  
☐ Simplicity .....  
☐ Full of places to discover .....  
☐ Exciting .....  
☐ Unique .....  
☐ Fun .....  
☐ Lively .....  
☐ Beautiful .....  
☐ Arts and culture .....  
☐ Relaxing .....  
☐ Action-packed .....  
☐ Adventurous .....  
☐ Charming .....  
☐ Modern .....  
☐ Rejuvenating .....  
☐ Refreshing .....  
☐ Peaceful .....

IF SAMPLE = in OR ip OR IF S1 =2, 3 OR 4, SKIP TO 15

13. Most states have advertising slogans they use to promote travel to their state. Please look at the following slogans and match them with the appropriate state.  
 SHOW EACH SLOGAN, WITH THE LIST OF STATES – ROTATE SLOGANS

- ☐ \_\_\_\_\_ Restart Your Engines  
☐ \_\_\_\_\_ So Much to Discover  
☐ \_\_\_\_\_ Pure Michigan  
☐ \_\_\_\_\_ Unbridled Spirit  
☐ \_\_\_\_\_ Mile After Magnificent Mile

- 1.....Kentucky  
 2.....Illinois  
 3.....Indiana  
 4.....Michigan  
 5.....Ohio



14. Please look at the following slogans and select the one that most represents each word. For example, which one is the most *fun*? You can only choose one slogan for each word.

- ☐ Indiana. Restart Your Engines
- ☐ Ohio. So Much to Discover
- ☐ Illinois. Mile After Magnificent Mile
- ☐ Pure Michigan
- ☐ Kentucky. Unbridled Spirit

- ☐ Welcoming..... \_\_\_\_\_
- ☐ Engaging..... \_\_\_\_\_
- ☐ Entertaining ..... \_\_\_\_\_
- ☐ Simplicity..... \_\_\_\_\_
- ☐ Full of places to discover ..... \_\_\_\_\_
- ☐ Exciting ..... \_\_\_\_\_
- ☐ Unique ..... \_\_\_\_\_
- ☐ Fun..... \_\_\_\_\_
- ☐ Lively..... \_\_\_\_\_
- ☐ Beautiful..... \_\_\_\_\_
- ☐ Arts and culture ..... \_\_\_\_\_
- ☐ Relaxing..... \_\_\_\_\_
- ☐ Action-packed..... \_\_\_\_\_
- ☐ Adventurous..... \_\_\_\_\_
- ☐ Charming ..... \_\_\_\_\_
- ☐ Modern..... \_\_\_\_\_
- ☐ Rejuvenating..... \_\_\_\_\_
- ☐ Refreshing ..... \_\_\_\_\_
- ☐ Peaceful..... \_\_\_\_\_

NOTE: ASK ALL STATE ADS TOGETHER PRINT, TV, THEN RADIO AS LISTED IN ORDER (IF THEY APPLY FOR THAT STATE) – ROTATING STATES ONLY

[VIDINTRO]

Now please review the following state tourism advertising, which includes streaming video clips.

If you have broadband internet access, such as a cable modem, DSL, or a fast connection at work, use the <U>Broadband</U> buttons.

If you have a dialup modem or you're not sure, use the <U>Dialup</U> buttons.

You must have Microsoft Media Player installed.

LINK in GETS IN, KY & OH ADS

LINK ip GETS IN, MI (Michigan.org), & OH ADS

IF S1 = 1, GETS IN, MI (Pure Michigan) & KY ADS

IF S1 = 2, GETS IN, IL, KY ADS

IF S1 = 3, GETS IN, IL AND MI (Michigan.org) ADS

IF S1 = 4, GETS IN, IL AND OH ADS

## Illinois

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Illinois\

### Please take a moment to view these print ads.

Illinois Garden of the Gods.jpg

Illinois Waterfall.jpg

Illinois Springfield.jpg

Illinois CloudGate.jpg

BELOW EACH AD ASK:

15. Have you seen this ad before?

- ☐ I have seen this print ad before
- ☐ I have NOT seen this print ad before

### Please take a moment to view these TV ads.

#### Illinois Backyard

mms://sms7.omniproductions.net/IN06\_ILTV1-1.wmv

mms://sms7.omniproductions.net/IN06\_ILTV1-1a.wmv

#### Illinois Millennium

mms://sms7.omniproductions.net/IN06\_ILTV2-1.wmv

mms://sms7.omniproductions.net/IN06\_ILTV2-1a.wmv

#### Illinois Love is Eternal

mms://sms7.omniproductions.net/IN06\_ILTV3-1.wmv

mms://sms7.omniproductions.net/IN06\_ILTV3-1a.wmv

Please click on Dialup or Broadband to view the ad then answer the question.

SHOW EACH AD AND ASK 16b:

16b. How many times have you seen this TV ad before?

- ☐ Unable to View Ad
- ☐ Never
- ☐ A few times
- ☐ Many times

17. Please indicate how much the Illinois ads ...

	Strongly Agree				Strongly Disagree
make you more interested in traveling within the state.	5	4	3	2	1
left you wondering about the location and wanting more information.	5	4	3	2	1
make you interested in visiting the state's website.	5	4	3	2	1
make the state seem fun and exciting.	5	4	3	2	1
make it appear scenic and beautiful.	5	4	3	2	1
show something unique and remarkable about the state.	5	4	3	2	1
portray it as a place full of unexpected discoveries.	5	4	3	2	1

## Indiana Ads

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana

### **Please take a moment to view these print ads.**

#### GROUP 1

ImgAd-Bloomington.jpg  
ImgAd-Indianapolis.jpg

#### GROUP 2

ImgAd-PatokaLake.jpg  
ImgAd-TurkeyRun.jpg

#### GROUP 3

Co-opNewBrand.jpg  
Co-opTransitional.jpg

#### GROUP 4

FSI06\_Page\_2.jpg  
FSI06\_Page\_1.jpg

#### GROUP 5

MWL-Insert\_Page\_1.jpg  
MWL-Insert\_Page\_3.jpg  
MWL-Insert\_Page\_5.jpg

### BELOW EACH GROUPING OF ADS ASK:

18. Have you seen these print ads before?

- ☐ I have seen the print ads before
- ☐ I have NOT seen print ads before

### **Please take a moment to view these TV ads.**

#### **RANDOMLY CHOOSE 3**

##### **Bluespring**

mms://sms7.omniproductions.net/IN06\_INTV1-1.wmv  
mms://sms7.omniproductions.net/IN06\_INTV1-1a.wmv

##### **Holidayworld**

mms://sms7.omniproductions.net/IN06\_INTV2-1.wmv  
mms://sms7.omniproductions.net/IN06\_INTV2-1a.wmv

##### **Indianadunes**

mms://sms7.omniproductions.net/IN06\_INTV3-1.wmv  
mms://sms7.omniproductions.net/IN06\_INTV3-1a.wmv

##### **Madison**

mms://sms7.omniproductions.net/IN06\_INTV4-1.wmv  
mms://sms7.omniproductions.net/IN06\_INTV4-1a.wmv

**Monumentcircle**

mms://sms7.omniproductions.net/IN06\_INTV5-1.wmv  
mms://sms7.omniproductions.net/IN06\_INTV5-1a.wmv

**Notredame**

mms://sms7.omniproductions.net/IN06\_INTV6-1.wmv  
mms://sms7.omniproductions.net/IN06\_INTV6-1a.wmv

**Paramount**

mms://sms7.omniproductions.net/IN06\_INTV7-1.wmv  
mms://sms7.omniproductions.net/IN06\_INTV7-1a.wmv

**Turkeyrun**

mms://sms7.omniproductions.net/IN06\_INTV8-1.wmv  
mms://sms7.omniproductions.net/IN06\_INTV8-1a.wmv

**Westbaden**

mms://sms7.omniproductions.net/IN06\_INTV9-1.wmv  
mms://sms7.omniproductions.net/IN06\_INTV9-1a.wmv

Please click on Dialup or Broadband to view the ad then answer the question.  
FOR EACH TV SPOT, ASK 19b:

19b. How many times have you seen this TV ad before?

- ☐ Unable to view ad
- ☐ Never
- ☐ A few times
- ☐ Many times

**Please take a moment to listen to these radio ads.**  
RANDOMLY CHOOSE 3

**blue\_spring\_caverns**

mms://sms7.omniproductions.net/IN06\_INRA1.wma

**Columbus**

mms://sms7.omniproductions.net/IN06\_INRA2.wma

**Indiana\_beach**

mms://sms7.omniproductions.net/IN06\_INRA3.wma

**Indiana\_dunes\_radio**

mms://sms7.omniproductions.net/IN06\_INRA4.wma

**Kroger**

mms://sms7.omniproductions.net/IN06\_INRA5.wma

**New\_harmony**

mms://sms7.omniproductions.net/IN06\_INRA6.wma

**Owens**

mms://sms7.omniproductions.net/IN06\_INRA7.wma

**paramount**

mms://sms7.omniproductions.net/IN06\_INRA8.wma

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**payless**

mms://sms7.omniproductions.net/IN06\_INRA9.wma

**Turkey\_run**

mms://sms7.omniproductions.net/IN06\_INRA10.wma

**West\_baden**

mms://sms7.omniproductions.net/IN06\_INRA11.wma

**white\_river\_state\_park**

mms://sms7.omniproductions.net/IN06\_INRA12.wma

FOR EACH RADIO SPOT, ASK 20b:

20b. How many times have you heard this radio ad before?

- ☐ Unable to view ad
- ☐ Never
- ☐ A few times
- ☐ Many times

21. Please indicate how much the Indiana ads ...

	Strongly Agree				Strongly Disagree
Makes you more interested in traveling within the state.	5	4	3	2	1
left you wondering about the location and wanting more information.	5	4	3	2	1
Makes you interested in visiting the state's website.	5	4	3	2	1
Makes the state seem fun and exciting.	5	4	3	2	1
Makes it appear scenic and beautiful.	5	4	3	2	1
Shows something unique and remarkable about the state.	5	4	3	2	1
portrays it as a place full of unexpected discoveries.	5	4	3	2	1

**Kentucky**

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**Please take a moment to view these print ads.****GROUP 1**

Co-op Cover - Bourbon Group.jpg

Co-op Cover - Carriage Ride.jpg

Co-Op Cover Row Boat.jpg

**GROUP 2**

CL layout spring2006 coop FINAL12-14-05\_Page\_2.jpg

CL layout spring2006 coop FINAL12-14-05\_Page\_4.jpg

**BELOW EACH GROUP ASK**

22. Have you seen this print ad before?

- ☐ I have seen the ad before
- ☐ I have NOT seen the ad before

**Please take a moment to view this TV ad.**

Please click on Dialup or Broadband to view the ad then answer the question.

**2006 Everyone Knows**

[mms://sms7.omniproductions.net/MDT06\\_KYTV1.wmv](mms://sms7.omniproductions.net/MDT06_KYTV1.wmv)

[mms://sms7.omniproductions.net/MDT06\\_KYTV1a.wmv](mms://sms7.omniproductions.net/MDT06_KYTV1a.wmv)

23b.. How many times have you seen this TV ad before?

- ☐ Unable to view ad
- ☐ Never
- ☐ A few times
- ☐ Many times

**Please take a moment to listen to this radio ad.**

[mms://sms7.omniproductions.net/MDT06\\_KYRA1.wma](mms://sms7.omniproductions.net/MDT06_KYRA1.wma)

24a Were you able to hear the ad?

- 1. Yes
- 2. No → SKIP TO TV AD

24b. How many times have you heard this radio ad before?

- ☐ Never
- ☐ A few times
- ☐ Many times

25. Please indicate how much the Kentucky ads ...

	Strongly Agree				Strongly Disagree
make you more interested in traveling within the state.	5	4	3	2	1
left you wondering about the location and wanting more information.	5	4	3	2	1
make you interested in visiting the state's website.	5	4	3	2	1
make the state seem fun and exciting.	5	4	3	2	1
make it appear scenic and beautiful.	5	4	3	2	1
show something unique and remarkable about the state.	5	4	3	2	1
portray it as a place full of unexpected discoveries.	5	4	3	2	1

IF S1 = 1, USE ADS WITH PURE MICHIGAN; ALL OTHERS USE Michigan.org

**Michigan – Michigan.org**

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**Please take a moment to view these print ads.**

**GROUP 1**

06\_bbb.jpg  
06\_beachtowns.jpg  
06\_harborco.jpg

**GROUP 2**

06\_heritage.jpg  
06\_heritage2.jpg  
06\_heritage3.jpg

**BELOW EACH GROUPING OF ADS ASK:**

26. Have you seen these print ads before?

- ☐ I have seen the print ads before
- ☐ I have NOT seen the print ads before

**Please take a moment to view this TV ad.**

IF LINK = ip, SHOW

**Bird\_Watching\_Indy**

mms://sms7.omniproductions.net/IN06\_MITV2-1.wmv  
mms://sms7.omniproductions.net/IN06\_MITV2-1a.wmv

IF S1= 3, SHOW

**Beach\_Ball\_ChicKids**

mms://sms7.omniproductions.net/IN06\_MITV1-1.wmv  
mms://sms7.omniproductions.net/IN06\_MITV1-1a.wmv

IF S1= 3, SHOW

**Sailing\_Chicago\_REV**

mms://sms7.omniproductions.net/IN06\_MITV3-1.wmv  
mms://sms7.omniproductions.net/IN06\_MITV3-1a.wmv

27b How many times have you seen this ad before?

- ☐ Unable to view ad
- ☐ Never
- ☐ A few times
- ☐ Many times

28. Please indicate how much the Michigan ads ...

	Strongly Agree				Strongly Disagree
make you more interested in traveling within the state.	5	4	3	2	1
left you wondering about the location and wanting more information.	5	4	3	2	1
make you interested in visiting the state's website.	5	4	3	2	1
make the state seem fun and exciting.	5	4	3	2	1
make it appear scenic and beautiful.	5	4	3	2	1
show something unique and remarkable about the state.	5	4	3	2	1
portray it as a place full of unexpected discoveries.	5	4	3	2	1

**USE ONLY IF S1=1**

**Michigan – Pure Michigan**

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**Please take a moment to view these print ads.**

2006\_bathingsuit.jpg

2006\_sit.jpg

2006\_golf.jpg

**BELOW EACH AD ASK:**

29. Have you seen this print ad before?

☐ I have seen the print ad before

☐ I have NOT seen the print ad before

**Please take a moment to view these TV ads.**

**Trailheads**

mms://sms7.omniproductions.net/IN06\_MITV4-1.wmv

mms://sms7.omniproductions.net/IN06\_MITV4-1a.wmv

**Water**

mms://sms7.omniproductions.net/IN06\_MITV5-1.wmv

mms://sms7.omniproductions.net/IN06\_MITV5-1a.wmv

**ZMED 6009-Sunrise\_large**

mms://sms7.omniproductions.net/IN06\_MITV6-1.wmv

mms://sms7.omniproductions.net/IN06\_MITV6-1a.wmv

**AFTER EACH ASK:**

30b How many times have you seen this ad before?

☐ Unable to view ad

☐ Never

☐ A few times

☐ Many times



31. Please indicate how much the Michigan ads ...

	Strongly Agree				Strongly Disagree
make you more interested in traveling within the state.	5	4	3	2	1
left you wondering about the location and wanting more information.	5	4	3	2	1
make you interested in visiting the state's website.	5	4	3	2	1
make the state seem fun and exciting.	5	4	3	2	1
make it appear scenic and beautiful.	5	4	3	2	1
show something unique and remarkable about the state.	5	4	3	2	1
portray it as a place full of unexpected discoveries.	5	4	3	2	1

### Ohio

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**Please take a moment to view these print ads**

#### **GROUP 1**

922607\_ODTT\_MNI.jpg

#### **GROUP 2**

D07722- AAA Co-Op Ad #1\_Page\_1

D07722- AAA Co-Op Ad #1\_Page\_2

#### **GROUP 3**

D07743 R2\_lo\_Page\_1.jpg

D07743 R2\_lo\_Page\_3.jpg

D07743 R2\_lo\_Page\_5.jpg

#### **GROUP 4**

D07745 Indy Monthly(F)\_Page\_1.jpg

D07745 Indy Monthly(F)\_Page\_2.jpg

#### **BELOW EACH GROUPING OF ADS ASK:**

32. Have you seen these print ads before?

- ☐ I have seen the print ads before
- ☐ I have NOT seen the print ads before

**Please take a moment to view these TV ads.**

**ODTT4333**

mms://sms7.omniproductions.net/IN06\_OHTV1-1.wmv

mms://sms7.omniproductions.net/IN06\_OHTV1-1a.wmv

splash30

mms://sms7.omniproductions.net/IN06\_OHTV2-1.wmv

mms://sms7.omniproductions.net/IN06\_OHTV2-1a.wmv

Please click on Dialup or Broadband to view the ad then answer the question.

FOR EACH TV SPOT, ASK 33b

33b. How many times have you seen this TV ad before?

- ☐ Unable to view ad
- ☐ Never
- ☐ A few times
- ☐ Many times

34. Please indicate how much these Ohio ads...

	Strongly Agree				Strongly Disagree
make you more interested in traveling within the state.	5	4	3	2	1
left you wondering about the location and wanting more information.	5	4	3	2	1
make you interested in visiting the state's website.	5	4	3	2	1
make the state seem fun and exciting.	5	4	3	2	1
make it appear scenic and beautiful.	5	4	3	2	1
show something unique and remarkable about the state.	5	4	3	2	1
portray it as a place full of unexpected discoveries.	5	4	3	2	1

35. Since January, please indicate the types of information you saw or received about the following states, if any.

	Saw an article or story	Saw an ad in a magazine or newspaper	Received e-mail promotion
Michigan			
Kentucky			
Indiana			
Ohio			
Illinois			

**The following questions are for classification purposes only, and will help us understand different groups of people.**

36. What is your marital status?

- ☐ Married
- ☐ Divorced
- ☐ Widowed
- ☐ Single/Never married
- ☐ Prefer not to answer

37. Including you, how many people currently live in your household? \_\_\_\_\_
38. If Q21 IS GREATER THAN 1: How many living in your household are children under the age of 18? \_\_\_\_\_
39. Which of the following categories best represents the last grade of school you completed?
- ☐ High school or less
  - ☐ Some College/Technical school
  - ☐ College graduate
  - ☐ Post graduate degree
  - ☐ Prefer not to answer
40. Which of the following categories best represents the total annual income for your household before taxes?
- ☐ Less than \$12,500
  - ☐ \$12,500 but less than \$20,000
  - ☐ \$20,000 but less than \$30,000
  - ☐ \$30,000 but less than \$50,000
  - ☐ \$50,000 but less than \$70,000
  - ☐ \$70,000 but less than \$100,000
  - ☐ \$100,000 or more
  - ☐ Prefer not to answer
41. What is your age? \_\_\_\_\_
42. Are you ☐ Male ☐ Female
43. What is your zip code? \_\_\_\_\_

Sample Type:  
DMAs –

1	Cincinnati	175
2	Champaign	150
3	Chicago	175
4	Grand Rapids	150
5	Indianapolis	175
6	Rest of Indiana	175
Total		1000